

McKenzie Park Apartments

100 McKenzie Park
Louisburg, NC 27549
(919) 496-2734

Thank You for your interest in McKenzie Park Apartments, offering 1, 2, and 3 bedroom apartments. Enclosed is our rental application that must be filled out completely. If a question does not apply to your situation, please answer N/A. We also ask that you use a pen when filing it out. Again, thank you for inquiring about McKenzie Park Apartments!

The following income restrictions apply for all persons applying for housing.

Maximum Adjusted Income

	<u>1 Person</u>	<u>2 Person</u>	<u>3 Person</u>	<u>4 Person</u>	<u>5 Person</u>	<u>6 Person</u>	<u>7 Person</u>
Very Low	33,500	38,300	43,100	47,850	51,700	55,550	59,350
Low	53,600	61,250	68,900	76,550	82,650	88,800	94,900
Moderate	59,100	66,750	74,400	82,050	88,150	94,300	100,400

	<u>1BR</u>	<u>2BR</u>	<u>3BR</u>
Rent Schedule:	10 @ \$0 - \$ 773	28 @ \$0 - \$781	2 @ \$0 - \$792

Rent Based on Income – Rental Assistance Available

Utility Allowance: \$170 \$222 \$218
(estimated utility cost per month - based on average utility cost for water, sewer & electricity)

Security Deposit: \$565 \$585 \$605

Minimum Income Requirements:

With RA	None	None	None
Without RA	\$17,640	\$19,368	\$19,752
For Section 8 Cert./Voucher	2.5 x (tenant rent + utility allowance) or \$3,600, whichever is greater		

No Pets Allowed

Smoking, including E-cigarettes will be prohibited in all residential units including porches and balconies. Smoking will be permitted 25 feet and beyond from all buildings. This policy applies to all residents, guests, employees, service personnel, and all other visitors to the property.

Application Requirements

1. **Completed and signed application.**
2. **\$25.00 money order or check payable to Evergreen Construction to cover the cost of the credit and criminal reports that we will run. An additional \$25.00 will be required if applicants have different last names or same last names but separate credit, (i.e. Parent/child). This applies to everyone 18 and older.**
3. **Enclose a copy of each household member(s) birth certificate.**
4. **Enclose a copy of each household member(s) social security card.**

**Return the above information to: McKenzie Park Apartments
100 McKenzie Park
Louisburg, NC 27549**



EQUAL HOUSING OPPORTUNITY



This institution is an equal opportunity provider and employer



RENTAL APPLICATION

(RD)

COMPLEX _____

RECEIVED/ COMPLETE _____

(Date) (Time)

APPLICANT INFORMATION

Do you have a Section 8 Certificate or Voucher? () Yes () No

Name _____ Birthdate _____ Social Security # _____

Email Address _____ Phone # _____

Current Address _____ City _____ State _____ Zip Code _____

How Long at this address? _____ Home Phone # _____ Current Landlord _____

Landlord Address _____ City _____ State _____ Zip Code _____ Landlord Phone # _____

Current Employer Address _____ City _____ State _____ Zip Code _____

Employer Phone # _____ Occupation _____ Length of Employment _____ Name of Supervisor _____

Have you ever been convicted of a felony or misdemeanor? _____ If yes, when? _____

Reason for Moving _____ Driver's License # _____ State Issued _____ How Many Vehicles? _____

Previous residences for last 5 years. ***Are you or will you be a Full-Time Student anytime during the next 12 months?** _____

Complete Address _____ Landlord _____ Landlord Phone # _____ From - To _____

CO-APPLICANT INFORMATION

Name _____ Birthdate _____ Social Security # _____

Current Address _____ City _____ State _____ Zip Code _____

How Long at this address? _____ Home Phone # _____ Current Landlord _____

Landlord Address _____ City _____ State _____ Zip Code _____ Landlord Phone # _____

Current Employer Address _____ City _____ State _____ Zip Code _____

Employer Phone # _____ Occupation _____ Length of Employment _____ Name of Supervisor _____

Have you ever been convicted of a felony or misdemeanor? _____ If yes, when? _____

Reason for Moving _____ Driver's License # _____ State Issued _____ How Many Vehicles? _____

Previous residences for last 5 years: ***Are you or will you be a Full-Time Student anytime during the next 12 months?** _____

Complete Address _____ Landlord _____ Landlord Phone # _____ From - To _____

OTHER INTENDED OCCUPANTS OF APARTMENT

Full Name _____ Relationship _____ DOB _____ Soc. Sec. # _____ Full-Time Student? Y/N _____

AUTOMOBILE INFORMATION

Model _____ Make _____ Tag # _____ Color _____

IN CASE OF EMERGENCY, ILLNESS, OR ACCIDENT, PLEASE NOTIFY:

Name _____ Relationship _____ Phone # _____

Address _____ City _____ State _____ Zip Code _____

Doctor _____ Phone # _____ Hospital _____

RD/HUD regulations require that all applicants/tenants reveal all sources of income and assets. This application is not considered complete and therefore can not be processed until the following questionnaire of income and assets has been completed by both the applicant and co-applicant. In cases of elderly, handicapped or disabled applicants a medical expense questionnaire must also be filled out as part of the application process. To determine if you meet the definition of handicapped or disabled, refer to the handicapped/disabled definition and questionnaire which must be completed by both the applicant and/or co-applicant in order to receive the deduction.

INCOME AND ASSETS QUESTIONNAIRE
(Complete for Everyone 18 years of Age and Older)

Household Member: _____

A. <u>Assets Section</u>	<u>Est. Amount/Value</u>	<u>Financial Institution</u>
Do you have any of the following:		
a. Checking Accounts	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
b. Saving Accounts	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
c. Certificate of Deposits	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
d. Money Market Funds	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
e. Stocks/Bonds/Mutual Funds	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
f. Treasury Bills	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
g. Annuities	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
h. IRA/Keough Accounts/401 K	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
i. Company Retirement Accounts	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
j. Pension Funds	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
k. Whole Life Insurance	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
l. Trust Accounts	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
If yes, is it irrevocable? Y or N		
m. Cash on hand, in Safety deposit boxes, etc	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
n. House/Real Estate	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
o. Rental Property	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
p. Other Investments	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
q. Personal property held for investment	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
2 Have you received any lump sum payments such as:		
a. Inheritances	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
b. Lottery Winnings	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
c. Insurance Settlements	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
d. Workman's Compensation Settlements	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
e. Social Security Disability Settlements	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
f. Unemployment Compensation Settlements	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
g. VA Disability Settlements	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
h. Severance Pay	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
i. Capital Gains	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
j. Educational Grants or Scholarships	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____
k. Other	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No	_____

3 Have you disposed of any assets for less than fair market value in the past two (2) years? () Yes () No
If yes, please state if it was due to foreclosure, bankruptcy or divorce.

TOTAL ESTIMATED AMOUNT/VALUE OF ASSETS \$ _____

B. <u>Income Section</u>	<u>Est Amount</u>
Do you receive any of the following:	
a. Wages, Salary, etc. through Employment	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
b. Income from a Business or Profession	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
c. Military Pay including Allowances	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
d. Social Security	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
e. SSI	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
f. TANF / Work First/ Other public assistance	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
g. Alimony	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
h. Child Support Payments	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
i. Unemployment Compensation	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
j. Workman's Compensation	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
k. Severance Pay	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
l. Retirement Income	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
m. Annuities Income	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
n. Long Term Care Payments	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
o. Insurance Policies Income	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
p. Disability or Death Benefits (Other than Social Security or SSI)	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
q. Income from Rental Property	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
r. Other	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
2 Do you regularly receive monetary gifts or non-cash contributions from persons outside the household for:	
a. Rent	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
b. Utilities	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
c. Groceries	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
d. Clothing	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
e. Miscellaneous Household Supplies	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No
f. Other	(<input type="checkbox"/>) Yes (<input type="checkbox"/>) No

TOTAL ESTIMATED AMOUNT OF INCOME \$ _____

By signing below, I certify the information provided is accurate and I understand that any misrepresentations may disqualify me for housing.

Signature Date

C. Miscellaneous Information

1. Do you pay any child care expenses for children age 12 or younger that enables a family member to go to work or to school? (Note: This amount should not exceed the amount earned at work or should not exceed a sum reasonably expected to cover class time and travel time to and from classes. Also, for this expense to be allowed as a deduction from income, the amount is not to be paid to a family member living in the household, is not to be reimbursed by an agency or individual and is allowed only if there is no adult member of the household capable of providing the care.)

() Yes () No Estimated Annual Amount _____

2. Do you have any handicapped assistance expenses which enable a family member (including the handicapped members) to work. (Note: This deduction may be given for expense amounts which exceed 3% of annual income provided they are not paid to a member of the household or reimbursed by an agency or individual.)

() Yes () No Estimated Annual Amount _____

DEFINITION OF DISABILITY AND HANDICAP

Individual with disability. A person is considered disabled if the person meets the criteria of either of the following:

1. The person has an inability to engage in any substantial gainful activity, but with use of auxiliary apparatus can otherwise participate in gainful activity, by reason of any medically determinable physical or mental impairment, where the disability:

- a. Has lasted or can be expected to last for a continuous period of not less than 12 months, or which can be expected to result in death, and
- b. Substantially impedes the ability to live independently, and
- c. Is of such a nature that such ability could be improved by more suitable housing conditions, or
- d. In the case of a sight impaired person who is at least 55 years old (within the meaning of sight impairment as determined in Section 223 of the Social Security Act), is unable, because of the sight impairment, to engage in substantial gainful activity in which he/she has previously engaged with some regularity over a substantial period of time.
- e. Receipt of veteran's or Social Security Disability payments benefits for disability, whether service-oriented or otherwise does not automatically establish disability.

2. The person has a developmental disability; a severe, chronic disability which:

- a. Is attributable to a mental or physical impairment or combination of mental or physical impairment; and
- b. Was manifested before age 22; and
- c. Is likely to continue indefinitely; and
- d. Results in substantial functional limitations in three or more of the following areas of major life activity:

- (1) Self-Care
- (2) Receptive and expressive language
- (3) Learning
- (4) Mobility
- (5) Self-direction
- (6) Capacity for independent living
- (7) Economic self-sufficiency

e. Reflects the person's need for a combination and sequence of special, interdisciplinary or generic care, or treatment, or for other services which are of lifelong or extended duration and are individually planned and coordinated.

Individual with handicap.

1. A person with a physical or mental impairment that:

- a. Is expected to be of long-continued and indefinite duration; and
- b. Substantially impedes the person or is of such a nature that the person's ability to live independently could be improved by more suitable housing conditions.

2. The term handicap further means, with respect to a person, a physical or mental impairment which substantially limits one or more major life activities; a record of such an impairment; or being regarded as having such an impairment. THIS TERM DOES NOT INCLUDE CURRENT ILLEGAL USE OF OR ADDICTION TO A CONTROLLED SUBSTANCE. As used in this definition:

a. Physical or mental impairment includes:

(1) Any physiological disorder or condition, cosmetic disfigurement, or anatomical loss affecting one or more of the following body systems: neurological; musculoskeletal; special sense organs; respiratory, including speech organs; cardiovascular; reproductive; digestive; genito-urinary; hemic and lymphatic; skin; and endocrine; or

(2) Any mental or psychological disorder, such as mental retardation, organic brain syndrome, emotional or mental illness, and specific learning disabilities. The term "physical or mental impairment" includes, but is not limited to, such diseases and conditions as orthopedic, visual, speech and hearing impairments, cerebral palsy, autism, epilepsy, muscular dystrophy, multiple sclerosis, cancer, heart disease, diabetes, human immunodeficiency virus (HIV) infection, acquired immunodeficiency syndrome (AIDS), mental retardation, emotional illness, drug addiction (other than addiction caused by current, illegal use of a controlled substance) and alcoholism.

b. Major life activities means functions such as caring for one's self, performing major tasks, walking, seeing, hearing, speaking, breathing, learning and working.

c. Has a record of such an impairment means has a history of, or has been misclassified as having a mental or physical impairment that substantially limits one or more of major life activities.

d. Is regarded as having an impairment means:

(1) Has a physical or mental impairment that does not substantially limit one or more major life activities but that is treated by another person as constituting such a limitation;

(2) Has a physical or mental impairment that substantially limits one or more major life activities only as a result of the attitudes of others toward such impairment; or

(3) Has one of the impairments defined in paragraph 2 a (1) and 2 a (2) of this definition but is treated by another person as having such an impairment.

Persons which meet the definition of disabled or handicapped qualify for a \$400.00 deduction to their annual income when determining rent contribution and certain other deductions. If after reading the definitions above you feel that you qualify and would like to request this adjustment to your income, please indicate in the space provided:

() Yes, I feel that I meet the definition of handicapped and/or disabled as defined above and would therefore like to request the \$400.00 adjustment to income.

() No, I feel that I do not meet the definition of handicapped or disabled as defined above and therefore do not request the \$400.00 adjustment to income.

If you have indicated your desire to request this adjustment, then we will need only sufficient information (documentation) to confirm your qualification for the handicapped/disabled status. Failure to provide this information may result in the denial of these deductions.

Would you like to request a handicapped designed unit?

() Yes

() No

Would you like to request reasonable accommodations/modifications to the unit?

() Yes, I would like to request _____

() No

FOR CONGREGATE HOUSING ONLY

Would you like to request a specific service or services?

() Yes, I would like to request _____

() No

MEDICAL EXPENSE QUESTIONNAIRE
*** FOR ELDERLY, HANDICAPPED OR DISABLED ONLY ***

1. Are you currently under the care of a physician, optometrist, ENT, etc. where you are having to pay for bills not covered by medical insurance? () Yes () No

If yes, please provide the following:

Name of Physician _____

Name of Physician _____

Address _____

Address _____

Phone _____

Phone _____

Name of Physician _____

Name of Physician _____

Address _____

Address _____

Phone _____

Phone _____

2. Are you currently having to take medication that is not covered by medical insurance? () Yes () No

If yes, provide the following:

Name of Pharmacy _____

Name of Pharmacy _____

Address _____

Address _____

Phone _____

Phone _____

Name of Pharmacy _____

Name of Pharmacy _____

Address _____

Address _____

Phone _____

Phone _____

3. Are you currently paying for hospital bills not covered by medical insurance? () Yes () No

If yes, please provide the following:

Name of Hospital _____

Name of Hospital _____

Address _____

Address _____

Phone _____

Phone _____

Total amount owed \$ _____

Total amount owed \$ _____

What is the estimated amount that you will spend over the next 12 months to reduce the amount owed? \$ _____

What is the estimated amount that you will spend over the next 12 months to reduce the amount owed? \$ _____

4. Do you pay medical insurance premiums? () Yes () No

If yes, please provide the following:

Name of Insurance Co. _____

Name of Insurance Co. _____

Address _____

Address _____

Phone _____

Phone _____

Monthly premium amount \$ _____

Monthly premium amount \$ _____

I (we) understand that this application must be filled out completely and accurately. I (we) certify the information provided is accurate and I (we) understand that any misrepresentations will disqualify me (us). I (we) further certify that the housing occupied on these premises will be my (our) permanent residence and I (we) do not/will not maintain a separate subsidized rental unit at any other location.

By signing this application, I (we) hereby authorize the management (or it's agent) of this complex, for purposes of this application, to contact and obtain any information required from any of the individuals or entities listed on this application, or from any other individuals or entities as may be required. Management further reserves the right to release this information for purposes of collecting outstanding debts.

I (we) understand that the managing agent will verify, in writing through a third party, the information provided on this application.

I (we) also understand that my household wages are subject to being verified through a third party source(s) by Rural Development or HUD or any successor agencies designated by the U.S. Federal government to administer this housing program.

WARNING

Section 1001 of the Title 18, United States Code provides, "Whoever, in any matter within the jurisdiction of any department or agency of the United States knowingly and willfully falsifies, conceals or covers up by any trick, scheme, or device a material fact, or makes any false, fictitious or fraudulent statements or representations, or makes or uses any false writing or document knowing the same to contain any false, fictitious or fraudulent statements or entry, shall be fined under this title or imprisoned not more than five years, or both.

If this application is approved, one month's prorated rent and security deposit or partial payment of deposit must be paid and lease and tenant certification must be executed in advance before occupancy of the apartment. NO REFUND WILL BE MADE except to comply with state and federal guidelines. All rent is due and payable in advance on the FIRST DAY OF THE MONTH.

Application will not be processed until applicant furnishes Criminal and Credit Report Fee. Criminal and Credit Report Fee must be in the form of a check or money order payable to Evergreen Construction Co. in the amount of \$_____. Fee is **NON-REFUNDABLE**.

BY SIGNING BELOW, I CERTIFY I HAVE READ AND UNDERSTAND ALL THE ABOVE.

SIGNATURES

Applicant _____ Date _____

Co-Applicant _____ Date _____

How did you hear about our apartment community? Newspaper () Phonebook () Resident ()
Drive-by () Flyer/Brochure () Other () Explain _____

Date possession of apartment desired _____

Comments:

The information solicited on this application is requested by the apartment owner in order to assure the Federal Government, acting through Rural Development or HUD, that federal laws prohibiting discrimination against all tenant applicants on the basis of race, color, national origin, religion, sex, familial status, age and handicap status are complied with. You are not required to furnish the information, but are encouraged to do so. This information will not be used in evaluating your application or to discriminate against you in any way. However, if you choose not to furnish it, the owner is required to note the race/national origin and sex of individual applicants on the basis of visual observation or surname.

Sex of Applicant _____ Race _____

Sex of Co-Applicant _____ Race _____

Ethnicity:
Hispanic or Latino _____ Not Hispanic or Latino _____

Ethnicity:
Hispanic or Latino _____ Not Hispanic or Latino _____

Marital Status:
Single _____ Married _____ Separated _____

Marital Status:
Single _____ Married _____ Separated _____



EQUAL HOUSING OPPORTUNITY



TENANT RELEASE AND CONSENT

I/We _____, the undersigned hereby authorize all persons or companies in the categories listed below to release without liability, information regarding employment, income, and/or assets to _____ for purposes of verifying information (owner or agent) on my/our apartment rental application.

INFORMATION COVERED

I/We understand that previous or current information regarding me/us may be needed. Verifications and inquiries that may be requested include, but are not limited to: personal identity; employment, income, and assets; medical or child care allowances. I/We understand that this authorization cannot be used to obtain any information about me/us that is not pertinent to my eligibility for and continued participation as a Qualified Tenant.

GROUPS OR INDIVIDUALS THAT MAY BE ASKED

The groups or individuals that may be asked to release the above information include, but are not limited to:

- | | | |
|--|----------------------------------|--|
| Past and Present Employers | Welfare Agencies | Veterans Administration |
| Previous Landlords (including Public Housing Agencies) | State Unemployment Agencies | Retirement Systems |
| Support and Alimony Providers | Social Security Administration | Banks and Other Financial Institutions |
| | Medical and Child Care Providers | |

CONDITIONS

I/We agree that a photocopy of this authorization may be used for the purposes stated above. The original of this authorization is on file and will stay in effect for a year and one month from the date signed. I/We understand I/we have a right to review this file and correct any information that is incorrect.

SIGNATURES

_____ Applicant/Resident	_____ (Print Name)	_____ Date
_____ Co-Applicant/Resident	_____ (Print Name)	_____ Date
_____ Adult Member	_____ (Print Name)	_____ Date
_____ Adult Member	_____ (Print Name)	_____ Date

NOTE: THIS GENERAL CONSENT MAY NOT BE USED TO REQUEST A COPY OF A TAX RETURN. IF A COPY OF A TAX RETURN IS NEEDED, IRS FORM 4506, "REQUEST FOR COPY OF TAX FORM" MUST BE PREPARED AND SIGNED SEPERATELY.